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# ***Down To Earth***

**Business Software**

**Sales Analysis**

**User's Reference Manual**



Version 7 series

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# Sales Analysis

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# Sales Analysis

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The Down To Earth Sales Analysis application provides a method to define custom reporting criteria and sorting using data from the Sales Order and Line history, Inventory item, Customer master (Tab), and Name/Address master files.

Although standard Sales Analysis codes are included with the standard application, you can also define your own criteria. The process begins by editing any of the predefined **Sales Analysis codes** or creating your own combination of sorting fields. For example, a report can list values by Category, within Item, within Customer, prompting for a range for each field. Another example could be to list all the Items sold within the Ship To ID.

The next step is to **extract the sales order and line history records** and summarize them based on the Sales Analysis codes defined. You can extract data for a single year or for many years of historical data and for a single SA code or for all codes. Periodically you should also **Update** the summary file with the current records or opt to **Re-pull** all the data to insure the analysis reports are up to date.

**Standard reports** offer the option of any of the Sales Analysis codes defined and the choice of the report format and values reported. For example, you can report values for the current Month/Quarter/Year, Past year/Current year, Month average, or choose quantities/price/cost to name a few. Optionally, you can report sales dollars, cost dollars, or sales quantity in the format specified.

In addition to the basic reporting, The Down To Earth Sales Analysis application offers the choice of

- Standard inquiry options for specific data based on SA codes in either bar graph (where you choose the ascii character to use for graphing or chart form
- Forecast sales demand for a single item or a group of items
- Analyze item purchases

The Sales Analysis application does require that the Down To Earth Inventory, Sales Order Entry, Accounts Receivable, and Name/Address applications have been installed. In addition, it is strongly suggested to retain a minimum of 24 months or more of Sales Order history before forecasting is accurate. Also not that the best time to start using Sales Analysis is at the beginning of a new accounting month or period.

# 1 Getting Started

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Select “Sales Analysis” from the Sales menu column to access the Sales Analysis application and display its main menu. Before you begin using Sales Analysis, you must perform the following functions in the order specified below:

1. Determine how sales data will be collected and analyzed in your company. Follow the instructions in the section, “Setting up your company.”
2. Define the sales analysis codes you will use for inquiries and reports. You can define up to 16 codes (1-16). Follow the instructions in the section, “Defining sales analysis records.” Or utilize the standard codes included with your distribution. Select “Codes ►” from the Maintenance menu column, then “Other ►,” and “Sales analysis” from the submenu.
3. Extract and summarize the sales data you need, for the SA codes you’ll be using. This data will be pulled from the order history files of the Sales Order Entry application and stored in the Sales Analysis summary file until the Sales Analysis history file is purged. Follow the instructions in the section, “Extracting sales history data.”



NOTE: Periodically you will want to update the original summarized records by selecting **Update** instead of **Repull** when extracting the data.

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## 2 The Maintenance Menu Column

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Most DTE Master and Transaction maintenance window entry allows for ID code creation ‘on the fly’ by using the “Field maintenance” shortcut for that field. However, because Sales Analysis is actually reporting records previously posted, this feature does not apply within the application.

The individual codes identified for use with Sales Analysis must be defined prior to Extracting the data as the extraction is done based on the SA code definition. Select “Codes” to define any application, system wide code (such as *Terms, Tax, Item category, etc*) used throughout Down To Earth. Once the SA code is defined, the records can be extracted.

In addition, from the Maintenance column you can

- Set up the company for which you are processing sales analysis information.
- Define factors affecting the sales data and reports, such as the date used as a basis for pulling sales data and the symbols used for bar graphs.
- Add, change, or delete information on sales analysis codes used to organize data for inquiries and reports.

**“Locate record” and “Find” shortcut:** If you’re using any Maintenance menu selection throughout DTE to change an existing record, you can use the “Locate record” shortcut to search for the record by any of the field choices displayed, based on the record key(s). This function only applies to DTE codes and Company maintenance selections for the Sales Analysis application. It does not apply for Extraction/Re-pull or Sales Analysis Maintenance processes except for the actual Analysis code itself.

Use the “Find” shortcut to search for a previously defined code during data entry if not already known. Most “Find” shortcuts do not offer search options but instead simply display a list of valid codes to use for data entry.

- ✓ Non–Windows environments display the message, “Find (Locate)” on the information line when your cursor is placed in a field or the shortcut key is enabled when you pull down the Records or Input menu columns. Any keyboard equivalent defined for your system is displayed in the menu column list.
- ✓ Windows environments either indicate the “Locate record” shortcut is allowed by enabling the Binoculars button or displaying a “Find” button next to the field with three periods. Either click on the enabled button or use the equivalent keyboard key as noted when you pull down the Records menu column.

For example, to locate a DTE Control record, use the “Locate record” shortcut to display the search options for Company code and Specification (Control). Wildcards are allowed along with several “Locate record” shortcut search options. Use the

“Find” shortcut when the cursor is in the Analysis code field to list all Sales Analysis codes previously defined. Please refer to the General Concepts User’s Reference manual for complete descriptions and additional examples.

**Keyboard shortcuts:** For your system’s actual keyboard shortcuts, pull down the General or Records menu column for Windows environments, within a menu column selection. Pull down the General, Records, and/or Input menu columns for the keyboard shortcuts in a non-Windows environment.

## 2.1 Extracting sales history data

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The Sales Analysis application obtains its summarized historical information from the Down To Earth Sales Order Entry invoice header history (*oeihdr.ism*) and invoice line history (*oeilin.ism*) files. Line item sales data is transferred and summarized into the Sales Analysis history file (*sasumh.ism*) and retained until purged.

The Sales Analysis history file is used to produce sales history reports, inquiries, and to forecast future demand. You should have six to 12 months of posted invoice data in Sales Order Entry history for any accurate forecasting. If you are forecasting demand for items with a strong seasonality factor, such as automobiles or toys, you should consider 24 months of sales history to be an absolute minimum.

After the bulk of the Sales Order history is extracted for each Analysis code (Repull option), you should also select the Update option on a set schedule. Updating the data once each day, week, or month keeps the Sales Analysis current with all sales statistics.

**Re-pull or Update:** To extract and summarize sales data, select “Extract sales history” from the Maintenance menu column. Down To Earth displays the Sales Analysis Extract window. You can replace existing SA summarized records by choosing to **Repull** the data or **Update** the existing summary records with current activity since the last update. You must run this process for each individual year separately, however can choose to extract records for a single code or all analysis codes.

**Hand-altered data:** Data can also be altered with a manual entry to adjust for trends that may not be reflected with the Sales Analysis data pulled from the Sales Order entry file. For additional information on hand-altered records, see the “Amounts window” heading in the next section, “Maintaining sales analysis data”

### *Sales Analysis Extract window*

**Year:** Enter the year of the sales data you want repulled or updated with Sales Order line history. This year must be in the range **1980 to 2050**.

**Analysis code:** Enter the sales analysis code to extract history for. This code must be previously defined by selecting “Codes ▶,” then “Other ▶,” and “Sales analysis”

from the Maintenance menu column. To extract the history records for all analysis codes, press <Enter> for an asterisk, \*, the default.

**Option:** Press <Enter> to choose the default and **Update** the existing sales analysis record(s) or choose **Repull** to remove existing records and extract all records again. You would choose **Repull** the first time the records are extracted, if any custom changes moved key fields within the data records, or if any mass changes were executed. For example if you ran the Inventory process, “Change item ID” to replace the item history, you need to repull Analysis codes affected.

- ✓ Choosing **Update** brings the existing Sales Analysis history file up to date by adding new data from the Sales Order Entry history file to the data that has previously been pulled. This process only extracts sales records that have not already been identified as summarized. You should update the SA summary records on a regular basis to insure the SA data is current. Your business should establish internal procedures to determine how often the Update should be run.
- ✓ Choose **Repull** to rebuild the sales analysis by
  1. Clearing all records currently in the Sales Analysis history file for the analysis code(s) entered.
  2. Resetting the flags for all records except those marked as hand-altered.
  3. Pull all new data from the order line history for the year indicated.

-----  
 When entry is completed, the cursor returns to the **Year** field. Use the “Go” shortcut to start the process. When completed, the menu column displays.  
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## 2.2 Maintaining sales analysis data

The Sales Analysis application is used to analyze existing sales data and to forecast future demand for one or more items. In planning your sales strategy, you may want to consider how an increase or decrease in the sales of an item may affect your overall financial picture. This can be accomplished by adding new or changing existing sales data. Selecting “Sales maintenance” allows you to adjust live data with new values.

The sales maintenance function allows you to manipulate your sales, cost, or quantity data artificially for a specific analysis code. When the Sales Analysis Maintenance window is displayed, you are automatically in “Add” mode as if you used the “Add” shortcut. You are allowed a single record for the combination of **Analysis code**, **Year**, and **Record type**. If the values entered in those three fields match a record in the sales history file (*sasumh.ism*), that data is automatically displayed.

**Purging ‘hand altered’ data:** Sales analysis records created or edited via this menu selection can not be deleted and will not be replaced with the standard **Repull** option of the sales history extract. To delete sales maintenance records, you must first purge the Sales Analysis history (via the “Purge history” selection of the Miscellaneous menu column), then extract the data again with the **Repull** option.

### **Sales Analysis Maintenance window**

**Analysis code:** Enter the sales analysis code for which you want to adjust sales data.. This code must already be defined via the Codes ►, Other ►, Sales analysis code maintenance routine.

You are then prompted for a single entry value for the fields defined as the key fields for the analysis code entered. For example, if the analysis code key fields were Customer and Item, you are prompted for a customer ID and an item ID respectively. If correct, press <Enter> or click on OK to enter that value and prompt for the next field.

The values you enter and their corresponding description display in the bottom portion of the Sales Analysis Maintenance window for visual verification.

**Year:** Enter the year of the sales data that applies, in the format **YYYY**. The value entered in this field must be between **1980** and **2050**.

**Record type:** Select the type of record you want displayed or press <Enter> to accept the default of **Sales**. Your choices are

**Sales** (The dollar amount generated from sales during the specified year.)

**Costs** (The cumulative cost of all units sold during the specified year.)

**Quantities** (The number of units sold during the specified year.)

-----  
 Use the “Go” shortcut to display the Amounts window and enter data for the calendar months, January through December. To enter zero for all months, use the “Fill defaults” shortcut and press <enter> or click OK. See the next section for details of each Amounts window field of entry.  
 -----

### **Amounts window**

The Amounts window displays twelve fields, one for each month (**Jan** through **Dec**) of the year you specified. Any actual detail amounts display in the respective period as the default value for that period. Enter the new amount for each month of sales, quantity, or cost, depending on what you selected in the **Record type** field of the previous window.

If you enter an amount that is different from the original amount, this sales record is flagged as ‘hand-altered,’ and future Sales Order Entry extracts will not replace it.

- ✓ If you choose the Extraction option **Update**, new data is added to the file without changing the ‘hand-altered’ record.
- ✓ Choosing the Extraction option to **Repull** will not repull the original record. You must purge the SA history (via the “Purge history,” Miscellaneous menu column selection) then Repull the Sales Order history.

-----  
 When you’re sure your data is correct, press <Enter> or click OK to process the sales maintenance data. The cursor returns to the Analysis code field for additional entry.

When all entry is complete, use the “Exit” shortcut to return to the Maintenance menu column.

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## 2.3 Defining codes

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Before you begin reporting, you must define any Sales Analysis codes that are unique for your company. There are several predefined codes included with the standard distribution, however, you may also choose to define codes specific to your needs.

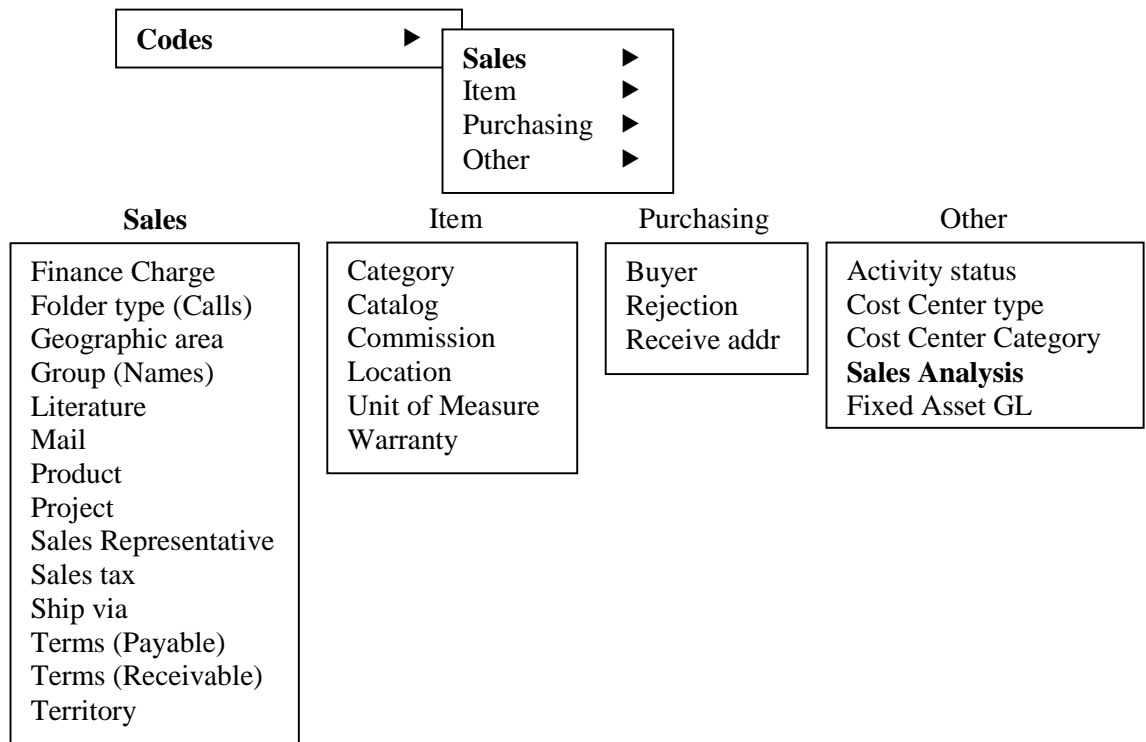
Select “Codes ▶” from the Maintenance menu column to define the various codes used by all the applications in Down To Earth. Although you can define or edit any of the application codes from this menu selection, only the Sales Analysis codes are actually referenced within the Sales Analysis application user’s reference manual.



**NOTE:** For more detailed information regarding each input field within the Sales Analysis code Maintenance or any other Codes Maintenance window, please refer to the Name/Address chapter of your Down To Earth User Reference manual, Defining codes section.

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From the “Codes ▶” selection, choose either “Sales ▶,” “Item ▶,” “Purchasing ▶,” or “Other ▶” to display the respective code selection menu. To define Sales Analysis codes, choose “Other ▶” then “Sales Analysis” for the Sales Analysis code Maintenance window.



**Code limits:** You can define up to sixteen different sales analysis codes, with up to six segments for each. The total characters defined for the six segments must total no more than 40 characters and/or digits. For purposes of the SA codes only, you can reduce the length of the segment by the maximum number of characters used if necessary to meet the 40 character limit. This does not change the actual data file, only how the Sales Analysis application looks at the data.

For example, the item ID field is 24 characters. If you’re only using 15 of those 24 characters for your ID, the key length can be defined as 15 within the SA code. This provides 9 more characters to incorporate for a different SA code.

**Field Definitions:** Each segment refers to a field contained within the data file(s) being accessed. The below table example lists the contents of the Sales Analysis (*UTF:safile.ddf*) file for the Sales Order Invoice Line history file. This example includes all the Down To Earth fields available for sorting and printing the reports and inquiries in the Sales Analysis application *oeilin.ism* file.

Data File	Field Name	Data Start	Data Length	Report Header	Starting/Ending Screen Prompt
1 OEILIN	CUST	021	08	CUSTMR	Customer Id
1 OEILIN	ITEM	029	24	ITEM-ID	Item Id
1 OEILIN	LOC	053	03	LOC	Location Code
1 OEILIN	CATG	086	03	CAT	Category Code
1 OEILIN	UOM	089	03	UOM	Unit of Measure Code
1 OEILIN	COMS	092	03	CMS	Commission Code
1 OEILIN	RLTY	095	03	RLTY	Royalty Code

For a complete detailed table of all files and fields available, see the “Sales Analysis Code Maintenance window” section within the “Codes ►,” “Other ►” Maintenance Menu column” section of the Name/Address User’s Reference manual. This section also includes the detailed description of each field of entry required for creating custom Sales Analysis codes.

**Entry Information:** Choose the “Add record” shortcut to add a new record, the “Edit record” shortcut to edit the displayed record, or the “Exit” shortcut to return to the Menu column. You can also utilize the “Locate record,” “Next record,” “Last record,” “Prior record,” or “First record” shortcuts to display a specific record in the entry window. You can use the “Help” shortcut for a brief description of any individual field. To cancel your input, use the “Cancel process” shortcut, the “Delete record” shortcut deletes the active record displayed, and be sure to use the “Update record” shortcut if any changes are made.



NOTE: All companies utilizing the Sales Analysis application use the same codes; therefore, you can define the codes once, while logged into any company, and then use them again for any other company.

## 2.4 Setting up your company

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Select “Company” from the Maintenance menu column to enter the information that Down To Earth requires to process data for the current company.

This menu entry allows you to designate the character to use for bar graphs, if the data is to be stored by calendar month or G/L fiscal periods defined, which key stores the item ID as the first segment, which date to pull data by, and if Sales Analysis should use the Net sale (minus discounts) or Gross sale.

**DTE Controls Maintenance summary:** The DTE Control variable and field definition is created via the System Manager application, “DTE Controls” in the Maintenance menu column. This method of creating Company controls allows for customization of the Company options for each application. (Please refer to your System Manager User ‘s Reference manual for more information re creating custom control variables.)

Defining the values for the standard DTE Control variables already in place are entered via the “Company” selection of each application and those values written to the *UTF:smctrl.ism* file. The Company, Application code, and Variable assigned automatically display at the top of the window, as well as a brief instruction message as help for its function at the bottom.

Not all Controls allow change within the application but are visible for information. In addition, some Controls, such as the data files, are considered system files and are only accessible via System Manager.

**Changing DTE control values:** Changing the value of a DTE controls variable requires you to completely exit Down To Earth and return again. When you re-enter that application, the change has taken affect.

**Entry Information:** Select “Company” to display the (Company) Control Maintenance window. Choose the “Edit record” shortcut to edit the displayed record. You can also use the “Locate record,” “Next record,” “Last record,” “Prior record,” or “First record” shortcuts to display a specific record. A brief help description is automatically displayed for each input field in lieu of the “Help” shortcut. Use the “Cancel process” shortcut to cancel any input or the “Exit” shortcut to return to the Menu column. Be sure to use the “Update record” shortcut if any changes are made.

### ***(Company) Control Maintenance window***

**Company code:** Display only. The code of the current company is displayed in this field.

**Application:** Display only. The application code assigned for the current application loaded.

**Control:** Display only. The variable assigned to the control of the function being defined. The order of the records displayed is alphabetical, by this field.



**NOTE:** Please see chart following each field description for the standard specifications of each option within the current application.

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**Spec type:** Display only. This field identifies the specification code assigned to the current variable. Please see chart to follow for standard specifications for each option within the application. The different types codes are:

- ✓ **ITM:**parameter - A parameter value entered by the user and not chosen from a selection window. The current fiscal year, your A/P Aging periods, the next invoice number, etc. are examples.
- ✓ **FIL:**data file - Not displayed within the individual application Company maintenance window. This identifies the data files and location (FIL) and is only displayed within the System Manager, “DTE controls” menu selection.
- ✓ **SEL:**selection - An option to be selected from a list of displayed choices. Yes/No values, the type of accounting basis - Cash or Accrual, printing an A/P proof list in order of entry or by vendor ID are just a couple of examples.
- ✓ **RPT:**report - Links the particular custom report specified to the “Custom reports” menu function in the Reports menu column.
- ✓ **ACT:**glaacct - Specifying the default account to be used for posting transactions is identified as this type of control.

**Data type:** Display only. Identifies this variable as **Alpha/numeric**, **Date**, or **Numeric** only field.

**Alpha Value:** Displayed only if the **Data type** field value is **Alpha/numeric**. Enter one of the choices as displayed in the available list or enter the text required as indicated for the particular variable. (An example is **Yes** or **No** to answer a question or the default G/L account numbers.)

**Date:** Enabled only if the **Data type** field value is **Date**. Enter the date that applies to the variable being defined. (An example is Last A/P Check date, automatically updated with each check post.)

**Number:** Enabled only if the **Data type** field value is **Numeric**. Enter the numeric value that applies to the variable being defined. (An example is the G/L current fiscal year.)

**Entered:** Display only. The date this record was originally entered.

**Changed:** Display only. The date this record was last changed.

### ***Company Maintenance Options***

**Bar graph character:** Enter the ASCII value of the character you want used to create the horizontal bar charts displayed by the **Graph** option of the “Standard inquiry” function. Any displayable ASCII character can be used.

For example, you would enter the ASCII value **124** to display vertical bars ( | ) or **171** to display the left bracket ( < ). For a complete table of the most common characters used for display, please see Appendix C in this manual.

Control	Spec type	Data type	Alpha value	Date	Number
<b>BARGRAPH</b>	ITM:parameter	Numeric			1 - 256

**Period store date:** Enter your choice to have data stored in the Sales Analysis files according to the **Calendar month** or based on the previously defined **Fiscal periods** from the General Ledger application. If the DTE General Ledger application is not installed, you must choose **Calendar month**.

Control	Spec type	Data type	Alpha value	Date	Number
<b>DASTORED</b>	SEL:selection	Alpha	Calendar month / Fiscal period		

**Record type for item:** This field must define the sales analysis code type record that has the **item ID** as the first field as a record key. This will be code number **3** when the system is shipped to you; however, if you change the codes, you must also change this number. This number is used to define the data records that will be used in the purchase analysis and forecasting functions.

Control	Spec type	Data type	Alpha value	Date	Number
<b>ITEMRECKEY</b>	ITM:parameter	Alpha	aaa		

**Pull by date:** Enter the type of date you want to use as a basis for pulling and recording the sales analysis information. Choose **Shipped** from the selection window if you want sales analysis data pulled and recorded based on the shipping date of the order. Choose **Invoice** from the selection window if you want the sales analysis data pulled and recorded based on the invoice date of the order.

Control	Spec type	Data type	Alpha value	Date	Number
<b>PULLBYDATE</b>	SEL:selection	Alpha	Invoice / Shipped		

**Sales amount:** Choose to report either the **Net amount** of the sale, considering any discounts given or the **Gross sale** amounts, the amount prior to any discounts that might apply to the invoice.

Control	Spec type	Data type	Alpha value	Date	Number
<b>SALESAMOUNT</b>	SEL:selection	Alpha	Invoice / Shipped		

## 3 The Transaction Menu Column

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For Sales Analysis application the Transaction menu column does not provide the same type of processing as some of the other DTE applications. For Sales Analysis, the transactions are done by this point in time. Analysis and forecasting are considered the transactions in this application.

Within the Transaction menu column there are several inquiries to offer you instant information. You can inquire

- by a specific Sales Analysis code, based on a period ending, and display either the actual amounts, a trend with the percent difference, or a bar graph comparing monthly amounts.
- forecast for a single item and predict future sales demand for an item for the month you specify, based on past sales history
- inquire for an item purchase needs based on the item's history

Additional selections from the Transaction menu column allow you to

- Make a sales inquiry
- Forecast future demand for a single item
- Forecast future demand for multiple items
- Analyze item purchase information
- Inquire on forecasting, create and modify forecast budgets

**Information/Error messages:** The most common message is that there is no data available for processing. This is most often the case when the data you're requesting has not been pulled or updated from the Sales Order Entry history files. Please refer to the previous section, "Extracting sales history data" for details of the extraction process.

**"Locate record" and "Find" shortcut:** If you're using any Maintenance menu selection throughout DTE to change an existing record, you can use the "Locate record" shortcut to search for the record by any of the field choices displayed, based on the record key(s). This function only applies to DTE codes and Company maintenance selections for the Sales Analysis application, however the "Find" shortcut is allowed for specific fields as noted with the display for your system.

- ✓ Non-Windows environments display the message, "Find (Locate)" on the information line when your cursor is placed in a field or the shortcut key is enabled when you pull down the Records or Input menu columns. Any keyboard equivalent defined for your system is displayed in the menu column list.

- ✓ Windows environments either indicate the “Locate record” shortcut is allowed by enabling the Binoculars button or displaying a “Find” button next to the field with three periods. Either click on the enabled button or use the equivalent keyboard key as noted when you pull down the Records menu column.

**“Field Maintenance” shortcut:** Throughout Down To Earth applications there are some Master fields that can be defined ‘on the fly’ while in other routines. Within the Sales Analysis application, however, this procedure does not apply and therefore has no functionality.

**Keyboard shortcuts:** For your system’s actual keyboard shortcuts, pull down the General or Records menu column for Windows environments, within a menu column selection. Pull down the General, Records, and/or Input menu columns for the keyboard shortcuts in a non–Windows environment.

### 3.1 Making a standard sales inquiry

---

The standard sales analysis inquiry allows you to view a summary of sales history, usually by month, which has been pulled from the history files of the Sales Order Entry application. The summary of data can be viewed in a variety of display choices and for any one of the sales analysis codes that has had the history pulled. Depending on the sales analysis code records you have defined you might view data such as monthly sales (in dollars) of a specific item to a specific customer.

To make a sales analysis inquiry, select “Standard inquiry” from the Transaction menu column. Down To Earth displays the Sales Analysis Inquiry window.

#### *Sales Analysis Inquiry window*

**Analysis code:** Enter the sales analysis code for which you want to inquire. The code definition determines which fields are then prompted for, the necessary key fields that were defined. For example, if you choose a code that is by item and location, DTE prompts you for an Item ID and location code as the next prompts. Once the entry is complete, the cursor returns to the **Period** prompt and to continue inquiry criteria.

**Period:** Enter the calendar month and year for which you want to display sales data. Down To Earth displays the month-by-month sales data for January through December of the year entered, regardless of the month value.

**Display type:** Choose the type of display you want from the displayed selection window. To accept the default of **Amount**, just press <Return>.

- ✓ Choose **Amount** to display the monthly quantity, total price (sales), total cost, and dollar and percentage margins for the year entered.
- ✓ Choose **Trend** to display the monthly quantity, price (sales), cost, and dollar margin with the percentage change from month to month for the year entered.

- ✓ Choose **Graph** to display horizontal bar charts for the record type (sales, cost, or quantity) for each month of the year entered, along with the actual amount in digits. The character that is used to create the bar chart comes from the ASCII value you entered when you defined your company.

**Record type:** Choose the type of record you want from the displayed selection window. Be sure you've pulled the appropriate records during the most recent extract process.

- ✓ Choose **Sales** to display the dollar amount generated from sales during the specified year.
- ✓ Choose **Cost** to display the cumulative cost of all units sold during the specified year.
- ✓ Choose **Quantity** to display the number of units sold during the specified year.

-----  
 When you're sure your data is correct, use the "Go" shortcut to display the values. If you've finished your sales analysis inquiries, use the "Exit" shortcut or press <Enter> to return to the Analysis code field for additional inquiries. Use the "Exit" shortcut again to return to the Transaction menu column.  
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## 3.2 Forecasting demand for a single item

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The forecasting functions allow you to predict future sales demand for an item for the month you specify, based on past sales history. To evaluate the data and determine the most accurate forecasting method, Down To Earth first determines how many months of sales history are available for the item. Forecasts are not accurate with less than 10 months of data or less than 70 percent of the past month's history.

If enough data is available, Down To Earth determines the seasonality of the data. Seasonality occurs when an item regularly has high and low sales. For example, heating oil shows a 12-month seasonality factor because it has high sales during the cold winter months and low sales during the rest of the year. This seasonality factor is determined by a process called auto-correlation analysis, which must have at least 24 months of past data in order to perform the calculations.

To forecast a single item interactively on the terminal screen, select "Forecast single item" from the Transaction menu column. Down To Earth will display the Forecast Single Items window.

### *Forecast Single Items window*

**Item ID:** Enter the ID of the item for which you want to forecast sales. Forecasts are not accurate with less than ten months of data or seventy percent of the past month's history available within the sales analysis file. If the item shows a seasonality factor, it must have at least 24 months of history available.

**Forecast date:** Enter the month and year you want to forecast for, in **MM/YYYY** format.

**Forecast:** To continue with the forecast, press <Return> to accept the default of **Yes**. To abort the forecast procedure, choose **No**.

**Re-evaluate:** The first time you calculate forecast quantities for an item, the program will perform the calculations using three different forecast methods (two if there is no seasonality factor) to find the one that has the lowest error factor. That method will be stored as the forecast method to use for future forecasting of the item until you choose to perform another forecasting evaluation.

As you accumulate more sales history, the best method to use may change; therefore, you might want to re-evaluate the forecasting method to assure that you are getting the most accurate forecast. To re-evaluate the forecast method for this item, choose **Yes**. To forecast according to the method already assigned to this item, press <Return> to accept the default of **No**.

Forecasting demand without re-evaluating the forecast method usually processes quickly (perhaps in a few seconds). If an evaluation is performed, however, you should expect a longer processing time (perhaps a few minutes). When the forecast is complete, the results will be displayed in the remaining fields on the screen. Those fields are described below.

When you press <Return>, Down To Earth performs the forecast for the item and date you specified. If there is enough data, the results of the forecast are displayed below.

**Seasonality length:** Display only. If the item is determined to have a seasonality factor, the length of that factor in months is displayed.

**Forecast method:** Display only. If you are forecasting based on the method already assigned to this item, that method and its related information will be displayed. If you are re-evaluating the forecast method, Down To Earth will display the results of three different methods (two if there is no seasonality factor). The forecast methods available are:

- Double Exponential Smoothing
- Two-Parameter Linear Exponential Smoothing
- Three-Parameter Linear Exponential Smoothing (**used only if there is a seasonality factor**)

**Factors:** Display only. The **Alpha**, **Beta**, **Gamma**, and **Smoothing** factor associated with each forecast method are displayed here.

**Absolute error:** Display only. Down To Earth compares the monthly forecasted quantities with actual quantities and calculates an error factor for each forecast method. The results are displayed here for the appropriate forecast method(s).

**Forecast quantity:** Display only. Down To Earth displays the quantities forecast by each method for the month you are forecasting.

-----  
 When you're finished viewing the forecast information for this item, press <Return> to clear the window. If you've finished forecasting single items, use the "Exit" shortcut to return to the Transaction menu column. NOTE: You may also want to print a Forecast report for this or multiple items. Please refer to the section, "Printing a Forecast Report" for more information.  
 -----

### 3.3 Forecasting demand for multiple items

---

The same forecasting functions used for single items can be used for a group of items. (See the previous section, "Forecasting demand for a single item" for a more detailed description of sales history requirements and forecasting methods.) Down To Earth will read the items from the Inventory item master file, accumulate the sales history, and perform and save the forecast.

If you've never done a forecast for an item that has history available, Down To Earth automatically evaluates the item to determine the best forecasting method, as it does when forecasting demand for a single item. If an item must be evaluated, the forecasting process slows considerably. The item being forecast and the status of the program are constantly displayed on the screen for your information.

To forecast demand for a group of items, select "Forecast items" from the Transaction menu column. Down To Earth will display the Forecast Items window.

#### *Forecast Items window*

**Starting item:** Enter the ID code of the first item in the group you want to forecast. You can enter up to 24 characters in this field. To begin the forecast group with the lowest item ID on file, press <Return> to accept the default value of \*.

**Ending item:** Enter the ID number of the last item in the group you want to forecast. You can enter up to 24 characters in this field. To end the forecast group with the highest item ID on file, or to include all items, press <Return> to accept the default value of \*.

**Forecast date:** Enter the month during which you want forecasting to begin, using the format MM/YYYY.

**Months to forecast:** Enter the number of months for which you want to forecast quantities. You can forecast for up to three months from the specified forecast date.

When you're sure your data is correct, press <Return> to complete the forecast. As Down To Earth reads each item in the Sales Analysis history file, its number and description will be displayed briefly in the **Current item** field below.

**Current item:** As Down To Earth reads each item in the Sales History file, its number and description are displayed briefly in this field.

-----  
 When the forecast is finished, Down To Earth will store the data. To print the results, use the "Forecast report" function in the Reports menu column.  
 -----

## 3.4 Analyzing item purchases

---

The “Purchase analysis” menu entry allows you to interactively evaluate certain inventory item ordering parameters. If you want to, you can then change the reorder point, economic order quantity, and lead time on the Inventory item file to optimize ordering.

When you choose an item for analysis, Down To Earth displays data from both the Inventory item and the Sales Analysis files in units and days’ supply, and displays messages to aid you in determining reorder parameters based on the forecasted demand for the item.

To perform a purchase analysis, select “Purchase analysis” from the Transaction menu column. Down To Earth will display the Item Purchase Analysis window.

### *Item Purchase Analysis window*

**Item ID:** Enter the ID code of the item for which you want to analyze purchase requirements.

**Location:** Enter the code of the location from which to get the quantities on hand, available, and on order for the analysis.

Press <Return>. If enough data exists for an item purchase analysis, the remaining fields on the screen will be filled in.

The values in the fields below will aid you in determining your optimum reorder point, economic order quantity, and lead time. You can change these if you want to. At the end of the session, you can save these new values back to the Inventory item file, or discard them.

**Reorder point:** Down To Earth displays the reorder point for the item record in units, calculates days’ supply, and displays a warning message if you are overstocked or understocked for the item. You can change the reorder points if you want to.

- ✓ The **units column** (not labeled) displays the number of selling units remaining at which this item should be reordered.
- ✓ The **days’ supply** is calculated as the number of units divided by the daily demand according to the most recent monthly forecast.

**Economic order qty:** Down To Earth displays the economic order quantity from the item record in units and calculates days’ supply. This is the number of buying units you must order to get the best price for this item. You can change this field if you want to.

**Lead time (days):** This field displays, from the item record, the number of days it takes to receive this item after it is ordered. You can change this field if you want to.

**Quantity on hand:** This field displays the number of units of this item in your inventory, in units and in days’ supply.

**Quantity available:** The quantity available is calculated by subtracting the quantity allocated from the quantity on hand.

**Quantity on order:** This field displays the number of selling units ordered from your supplier, in units and in days' supply.

**Forecast month:** The next three months for this forecast are displayed in these fields.

**Forecast quantity:** The monthly quantities for this forecast are displayed in these fields.

**Daily demand:** The average daily demand for each month listed is divided into the number of units (quantity on hand) in order to calculate the days' supply remaining.

**Sell unit of measure:** This field displays the code assigned to the unit of measure by which this item is sold (e.g., by the foot or by the dozen).

**Buy unit of measure:** This field displays the code assigned to the unit of measure by which this item is purchased from your supplier (e.g., by the foot or by the dozen).

**UOM conversion factor:** The unit of measure conversion factor is used to convert the quantity received from the supplier to the quantity available for sale. For example, if you buy widgets in boxes of 100 but sell them in boxes of 25, this field should contain a **4**.

**Forecast method:** Down To Earth performs forecasting calculations using three different methods and uses the one with the lowest error factor. One of the following forecast methods will be displayed in this field:

Double Exponential Smoothing  
Two-Parameter Linear Exponential Smoothing  
Three-Parameter Linear Exponential Smoothing (**includes seasonality factor**)

**Seasonality length:** If sales of this item are seasonal, the length of the seasonality factor in months is displayed here.

**Save changed values:** Select **Yes** if you want to save changed values to the Inventory item file. If you don't want to save the changed values select **No** to discard them. This will update the reorder point, economic order quantity, and/or lead time for this item.

-----  
When you've finished viewing the purchase analysis for this item, press <Return> to clear the window. If you're finished with all purchase analysis transactions, use the "Exit" shortcut to return to the Transaction menu column.  
-----

## 3.5 Forecast sales inquiry

---

The forecast inquiry values are taken from the forecast history file (*safcst.ism*) that is created by the Miscellaneous menu selection, “Build forecast history.” The Inquiry is for a specific **Year** and optionally single or all Sales Representatives, item **Category** code, or **Brands** (the brand is identified as the first three characters of the item ID).

The values displayed include Sales, Profit, calculated Margin, Forecast, and the percent of difference between the sales and forecast values (sales divided by forecast).

## 3.6 Create sales forecast

---

To create a budget record for forecasting values from either existing or actual amounts, select “Create forecast budgets” from the menu. This process allows you to generate forecast budget values for a new year without re-entering manually and with many different calculation options.

**Entry Information:** You can use the “Fill defaults” shortcut to enter all budget creation criteria fields with the default values, however, the **To Year** field requires keyboard input. There is no default value for this field. Once all the criteria is entered, use the “Go” shortcut to start the creation process.

### *Create Forecast Budgets window*

**Actual or Forecast:** Choose **Actual amounts** if you want the new budgets created from existing actual sales amounts. Choose **Forecast amounts** if you want the new budgets created from existing forecast values.

**Starting salesrep:** Enter the first sales representative code to create a budget for. If you want to start with the first code on file, press <Return> to accept the default value, \*.

**Ending salesrep:** Enter the last sales representative you want included for creating budgets. If you want to include through the last code on file, press <Return> to accept the default value, \*.

**Starting category:** Enter the first item category code to create a budget for. If you want to start with the first code on file, press <Return> to accept the default value, \*.

**Ending category:** Enter the last category code you want included for creating budgets. If you want to include through the last code on file, press <Return> to accept the default value, \*.

**Starting brand:** Enter the first brand value (the first three characters of your item ID) to create a budget for. If you want to start with the first code on file, press <Return> to accept the default value, \*.

**Ending brand:** Enter the last brand value you want included for creating budgets. If you want to include through the last code on file, press <Return> to accept the default value, \*.

**Amount option:** Choose **Actual amounts** if you want to base the new budget on the actual sales amounts. Choose **Period average** if you want to base the new budget amounts on the average period sales amounts for the year. Choose **Zero amounts** if you want the new budget created but the budget amounts set to zero.

**Inflate option:** Choose **\$ inflate** if you want to inflate the amounts by a fixed dollar value and move the cursor to the **Inflate dollars** field. Choose **% inflate** if you want to inflate the amounts by a percentage and move the cursor to the **Inflate percent** field. Choose **None** if you don't want to inflate the amounts.

**Inflate dollars:** If you selected **\$ inflate** at the **Inflate option** prompt, enter the dollar amount you want used when inflating the amounts created for the new budget records.

**Inflate percent:** If you selected **% inflate** for the **Inflate option** prompt, enter the percentage you want used when inflating the period amounts created for the budget records. For example, if you enter **.10** (one tenth of one percent) for the **Inflate %** field, a period budget of 3,000.00 is inflated by 3.00 for each period.

**To year:** Enter the year to be assigned to the budget records you are creating. There is no default value for this field.

-----  
Use the "Go" shortcut to start the creation of the new budgets.  
-----

### 3.7 Modify sales forecast (budgets)

---

To enter new single forecast budgets or modify records already created, select "Modify forecast budgets" from the Transaction menu column.

You can enter an annual amount to be divided equally among the periods, or you can enter a different amount for each period. You can also use the inflate option to calculate budgets for periods two through 13, based on the period one amount and a user-defined inflate percentage.

**Entry Information:** Choose the "Add record" shortcut to add a new record, the "Edit record" shortcut to edit the displayed record, or the "Exit" shortcut to return to the Menu column. You can also utilize the "Locate record," "Next record," "Last record," "Prior record," or "First record" shortcuts to display a specific record in the entry window. You can use the "Help" shortcut for a brief description of any individual field. To cancel your input, use the "Cancel process" shortcut, the "Delete record" shortcut deletes the active record displayed, and be sure to use the "Update record" shortcut if any changes are made.

### **Forecast Budget Maintenance window**

**Year:** The system will automatically display the first budget record in the forecast file (*safest.ism*). Use the “Add record” shortcut to add a new budget and enter the year that it applies.

**Sales rep:** Enter the identification code for the sales representative to budget the amount for. This field is Display only when editing an existing record.

**Category:** Enter the item ID category code that applies for the budget amount. This field is Display only when editing an existing record.

**Brand:** Enter the first three characters of the item ID re-classified and labeled “Brand” that this budget applies to. This field is Display only when editing an existing record.

**Method:** From the displayed selection window, choose one of the following. The default value is **Annual**.

- ✓ **Annual** to divide an annual amount equally among the accounting periods
- ✓ **Period** to enter a specific dollar amount for each accounting period
- ✓ **Inflate** to enter an amount in period one and have the system calculate the remaining periods using a specified percent to inflate each period from the previous. For example, if you have a new product, and you project that sales will increase 5% each month for the rest of the year, you would choose **Inflate**, enter an inflation percentage of **5.00%**, and enter an initial budget amount for period 1. The amount calculated for each following period will then be 5% more than the prior period.

-----  
 If you select **Annual**, the cursor moves to the **Annual amount** field. If you choose **Period**, the cursor moves to the **Period 1** field. Choose **Inflate %** to advance the cursor to the **Inflate%** field.  
 -----

**Annual amount:** Enter the amount to be allocated equally among the accounting periods. If the budget amount is the opposite of the account’s normal balance, place a minus sign (–) either before or after the budget amount. For example, if the account normally has a debit balance but the budgeted amount is a credit, also enter a minus sign. The system automatically calculates the budget amounts for each accounting period. Any remainder is added to the last period amount. The maximum size of this field is **99,999,999,999.99**.

**Inflate %:** Enter the percentage to inflate for each period based on the amount entered for the **Period 1** field. The budget amount is inflated by this percent for each subsequent period. For example, if you enter **.10** (one tenth of one percent) for the **Inflate %** field, a period 1 budget of 3,000.00 is inflated by 3.00 for each successive period.

**Period 1 - 12:** Entering an annual budget amount allows Down To Earth to automatically calculate and enter the budget amount for each period. If you selected

**Period** at the **Method** prompt, you must manually enter the dollar amounts for each of the accounting periods. If you selected **Inflate** for the method, the period budgets are automatically calculated based on the inflate percentage and the amount manually entered in the **Period 1** field. The maximum size of this field is **9,999,999,999.99**.

-----  
Use the “Update record” shortcut to write the record (new or changed) to the data file. For new record entry, the window is cleared and the cursor is displayed in the **Year**entry field for the next budget entry. If you’re finished creating budgets, use the “Exit” shortcut to return to the Maintenance menu column.  
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## 4 The Reports Menu Column

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The reports menu column recaps the inquiry displayed data and additional reported information as hardcopy instead of display values. The most often used reports are the Sales Analysis standard reports. The ten predefined formats include options for month, quarter, and year values, previous year comparisons, averages, quantity, price, and costs values, and a recap of the best selling items and best buying customers.

In addition to the standard sales Analysis reporting you can also

- Print a n analysis of items sold starting for a specific week
- Forecast needs for a range of items
- Custom reports and processes
- Queued reports

**Default values:** The most common report field entries are chosen as the default field values for most reports. Starting and ending fields are designated by either an asterisk ( \* ) or the lowest and highest numeric values for all. Other field defaults are listed as the first of multiple choices from a selection window.

If you know you want to generate a report using all the default values in the report criteria fields, you can use the “Fill defaults” shortcut, then the “Go” shortcut to start the report generation. If keyboard input is required, the “Fill defaults” process will stop at those fields with a screen message as a reminder.

**“Find” shortcut:** Many of the reports enable the “Find” shortcut for standard records such as Sales Analysis code. Because of the uniqueness of Sales Analysis, the displayed list of choices is usually displayed automatically without the standard key look up fields.

**Keyboard shortcuts:** For your system’s actual keyboard shortcuts, pull down the General or Records menu column for Windows environments, within a menu column selection. Pull down the General, Records, and/or Input menu columns for the keyboard shortcuts in a non–Windows environment.

**Printing Options:** When printing, you have several options for the output of that report.

- ✓ **Printer** – brings up a selection window with all previously defined printers available for your system
- ✓ **Screen** – display the full report to your screen with shortcut options available to move the data up, down, left, right, first page, or last page
- ✓ **Queue** – write the report to your harddisk to print at a later time via “Queued reports,” Reports/Inquiry menu column

- ✓ **Text file** – choose the logical directory and filename to write the report to your harddisk
- ✓ **Abort** – cancel the printing of the selected report

**Printing to the screen:** There are many shortcuts that can be used when printing a report to the screen. For the exact key assigned to each shortcut for your system, activate the menu bar and pull down the View and General menu columns.

Once the report is displayed, use the “Next page” and “Previous page” shortcuts to view the data one screen at a time vertically. Also use the “End of the line” and “Beginning of the line” shortcuts“ to move to the far right and back to the far left of a report. To move immediately to the last page of the report, use the “Last page” shortcut and the “First page” shortcut, returns you to the first page. Use the “Exit” shortcut to return to the original application menu column when viewing is completed.

**Printing to an API printer:** Windows environments have the option to define a printer as API (Application Programming Interface) allowing a preview mode with the use of all Windows based functions such as Zoom in and out based on a percentage, page by page viewing, and printing directly from the preview mode. For additional information on an API printer, please refer to the System Manager User’s Reference chapter, “Defining Printers” section.

## 4.1 Printing a standard Sales Analysis report

---

Down To Earth’s standard sales analysis reports to include sales, quantity, or cost data in any of the combinations you defined in your sales analysis codes. These can be displayed and printed in up to ten different report formats as listed below to provide multiple combinations for analysis. To print a standard sales analysis report, select “Standard reports” from the Reports menu column.

**Sales report format:** Because you can specify your own sales report format, it may be helpful to keep in mind an overall “master” format, although the specific headings may vary. This format is:

[Record Type] for [Key Segment 1]  
 listed by [Report Format]  
 and by [Key Segment 2,3...]  
 with totals for [Key Segment 1,2,3...]

As a color coded example . . .

[Record type] of **Sales** for [Key segment1] **Item** of the **Item/location** Analysis code  
 listed by [Report format] **Month/Quarter/Year**  
 and also for [Key segment 2] **Location**  
 with totals for [Key Segment 1] **Item**

Produces data similar to the below in format . . .

```

TIME:10:42                SALES ANALYSIS REPORT                SA6001
COMPANY: 01                SALES                CURRENT MONTH: 12/200x
*****
ITEM-ID
      LOC                MONTH                QUARTER                YEAR
*****
15-08 - #94A WHISPER 1,2,3/DYNAFL
      002 - Warehouse #2                132.000                169.000                290.000
32-77 - #210 PREVUE SWING 10MM X
      001 - Location 001                5,426.000                8,253.000                11,200.000
      005 - Warehouse #5                33.000                33.000                76.000
      Total #210 PREVUE SWING 10MM X                5,459.000                8,286.000                11,276.000

SMOKER - SMOKER
      009 - Bill of Materials                .000                .000                56.000

Report Totals                .000                .000                11,622.000

```

### *Sales Analysis Reports window*

**Analysis code:** From the displayed selection window, choose the sales analysis code to be used on this report. This code determines the sequence of the items listed and the totals/subtotals printed.

**Report format:** From the displayed selection list, select the report format you want to print. The report headings may vary slightly, depending on the analysis code.

- ✓ **1:Month/qtr/yr** lists record type totals by specified month, specified quarter, and specified calendar year for each item or other key segment, along with month, quarter, year, and report totals.
- ✓ **2:Past/cur yr** lists year-to-date record type totals for each item or other key segment for the past year, specified year, difference between specified and past year “to date” item totals, and percentage of increase or decrease of specified year over past year “to date” item totals.
- ✓ **3:Quarters** lists quarterly and yearly sales for each item, with quarterly and yearly totals for each item or other key segment and report.
- ✓ **4:Qtr months** lists the specified quarter’s sales broken down by month, the sales for the quarter, and the sales for the specified year for each item or other key segment. The specified quarter used is always the calendar quarter (e.g., January, February, March).
- ✓ **5:Month average** lists the current month’s sales, the average year-to-date monthly sales, the difference between the specified month’s sales and the average monthly sales, and percentage above or below average for the specified month’s sales, and the total for the specified calendar year for each item or other key segment.
- ✓ **6:Qty/price/cost** lists the total quantity, total cost, total price (total sales), profit margin, and percentage or profit for the specified number of months in the specified calendar year for each item or other key segment. The number of months included in these totals comes from the **Months for format 6** field in the “Company” function. For example, if you enter **3**, Down To Earth will list totals for January through March of the specified calendar year.

- ✓ **7:Months** will list monthly totals for January through December of the calendar year for the period specified. January through June sales are listed on the first line, and July through December sales are listed on the second line. Item totals for the year are also listed.
- ✓ **8:Best sellers** (items) lists the items sold for the **Ending period** specified in order by the highest value of either **Sales**, **Cost**, or **Quantity** chosen as the **Record type**.
- ✓ **9:Best customers** lists the same type of information as with **Best sellers** but requires that the Customer ID be a part of the Analysis code. For example, Analysis code for Item/Location does not produce any data, however, the Analysis code for Cust/Category does.
- ✓ **A:Qty/price/unit price** provides similar data to the Qty/price/cost option but substitutes the unit price for the cost value.

**Record type:** From the displayed selection window, choose the type of record you want printed on the report. (Exception: Report format 6 displays all three record types.) To accept the default of **Sales**, just press <Return>.

- ✓ Choose **Sales** to print the dollar amount generated from sales during the year and for the format specified.
- ✓ Choose **Costs** to print the cumulative cost of all units sold during the year and for the format specified.
- ✓ Choose **Quantities** to print the number of units sold during the year and the format specified.

**Beginning period:** Enabled only for Report format type A:Qty/price/unit price. Enter the month and year in the format **MM/YYYY** as the beginning period to include in this report.

**Ending period:** Enter the month and year in the format **MM/YYYY** to be the current period for the report. This period will be used to determine the year to print and, in some cases, the current month or quarter.

**Page break level 1:** Select **Yes** if you want to start a new page each time the main sort field for the selected analysis code changes. Select **No** if you do not want page breaks.

-----  
 When you're sure your data is correct, use the "Go" shortcut to continue with the specific data prompts. Down To Earth will prompt you for the **Starting** and **Ending** code for each key segment as defined by the Analysis code. The exact prompts are different for each analysis code. As with most other report windows, enter the code for the first and last members of the group you want to report. Optionally you can press <Enter> to accept the default of \* indicating lowest starting code and/or highest ending code.

When you've entered data in all the fields, press <Return> to pull down the Print Option menu column. From the Print Option column, select where you want the report to be sent. After you've printed your report, press <Return> to return to the Reports menu column.  
 -----

## 4.2 Printing a Week analysis

---

Select “Week analysis” from the Reports menu column to determine forecasting stock quantities on the report from a particular starting week in your calendar year. This option lets you determine what your inventory stock status is in relationship to past history of sales and a suggested action based on several factors.

The operator is prompted for a range of items and locations, the starting week, and a calculated status comment to determine if the item is Critical, Short, Dead, Overstock, or Not dead. Each item for each location specified is listed along with the quantity on hand, what is calculated to be required based on history, that quantity converted into weeks, the lead time, if any are on order and the expected date, and the calculated status.

**Calculated status:** The calculated status comment is based on a sales history, the lead time needed for an item, determined factors, and current supply to determine a forecast formula. If the forecast is zero or less, the item is determined DEAD. For items where a weeks supply is less than a weeks lead time, the status is considered SHORT. If there is less than a weeks supply of items, the status is CRITICAL. If the forecast is more than a weeks supply and it has a short lead time, the status is determined to be OVERSTOCK. All other situations are determined to be NOT DEAD.

### *Week Forecast Analysis window*

**Starting item ID:** Enter the ID code of the first item in the group you want to forecast. You can enter up to 24 characters in this field. To begin the forecast group with the lowest item ID on file, press <Enter> for the default value, \*.

**Ending item ID:** Enter the ID code of the last item in the group you want to forecast. You can enter up to 24 characters in this field. To end the forecast group with the highest item ID on file, press <Enter> for the default value of \*.



NOTE: All items within the range entered are included even if there is no historical data to consider for forecasting.

---

**Starting location:** To include items that are stored in locations whose codes fall within a particular sequence, enter the first code in that sequence. To begin the worksheet with the location that has the lowest code on file, press <Enter> for the default value, \*.

**Ending location:** To include items that are stored in locations whose codes fall within a particular sequence, enter the last code in that sequence. To end the worksheet with items from the location with the highest code on file, press <Enter> for the default value, \*.

**Week begin date:** Enter the date as the first week to consider history records for this report, **back** for the previous 128 weeks. Press <Enter> for the current system date and begin with the current date.

For example, if you enter a date of 12/31/2006, the first week of history data to consider for forecasting is the week prior, the week ending and including 12/30/2006. The second week of history is ending 12/23/06, the third ending 12/16/06, etc. The forecasting formula considers all data, backward in time, starting with the date entered in this field.

**Include:** Choose the specific type of items to report from the displayed list or press <Enter> for the default, **All** types. The other choices are

- ✓ **Dead** – if the forecast is zero or less
- ✓ **Short** – For items where a weeks supply is less than a weeks lead time
- ✓ **Critical** – If there is less than a weeks supply of items
- ✓ **Overstock** – If the forecast is more than a weeks supply and it has a short lead time, the status is determined to be OVERSTOCK.
- ✓ **Not Dead** – covers all other situations

-----  
 You can use the “Fill defaults” shortcut to enter the displayed default information in all fields. Use the “Go” shortcut to pull down the Print Option menu column and choose where you want the Sales Analysis report to print.  
 -----

## 4.3 Printing a Forecast Report

---

Select “Forecast” from the Reports/Inquiry menu column to print a Forecast Report for a single or range of items. This report consists of data from the sales analysis purchase recommendation file (*sapurr.ism*), forecasting recommended quantities for the next three months. The report includes the item ID and description, the forecast type, quantity and forecast dates for month 1, 2, and 3.

The data considered and most optional factors are taken from the operator input for the most recent generation of the forecast process. Select “Forecast items” from the transaction menu column to create the forecast items data base.

### *Forecast Report window*

**Starting item ID:** Enter the ID code of the first item in the group you want to forecast. You can enter up to 24 characters in this field. To begin the forecast group with the lowest item ID on file, press <Enter> to accept the default value, \*.

**Ending item ID:** Enter the ID code of the last item in the group you want to forecast. You can enter up to 24 characters in this field. To end the forecast group with the highest item ID on file, press <Enter> to accept the default value of \*.

-----  
 You can use the “Fill defaults” shortcut to enter the displayed default information in all fields. Use the “Go” shortcut to pull down the Print Option menu column and choose where you want the Sales Analysis report to print.  
 -----

## 4.4 Custom Reports and Processes

---

Any custom programmed report or process installed for your business is displayed in the Custom Reports window by selecting “Custom reports” from the Reports/Inquiry menu column.

The program name and description must be defined via the DTE Controls maintenance variable CUSTOM-## where ## is a number 01 – 28 for the specific application. The actual program name and the description that appears in the Custom Reports window, is defined via the “DTE Controls” Maintenance menu selection, in the System Manager application.

### *Custom Reports window*

**Program number:** Chose number 1 – 28 from the displayed list of available custom reports or processes. If a custom report of process is not displayed but you know is installed, verify that the DTE Controls variable is defined fir that company and application. Any subsequent input windows are custom and not defined in this manual.

-----  
 Use the “Go” shortcut to pull down any additional customized input windows or the Print Option menu column to choose where you want the report to print.  
 -----

## 4.5 Printing queued reports

---

To display a list of the reports that have been printed to the Queue, select “Queued reports” from the menu. The report description, (file) name, date and time queued, company code, and unique ID of the user who queued the report is automatically displayed. Choose the report you are now ready to print from the displayed window. Use the “Page up” and “Page down” shortcuts or the up and down arrow keys to find the correct report.



**NOTE:** The reports listed are created when the Print Option menu column is pulled down and an operator has chosen “Queue” from the list. The reports you can access will depend on your user security set up in System Manager.

---

You can print one or more copies of the report, delete a report from the print queue, or rename a report. We also suggest that you use this menu entry to view the queued reports before you clear the print queue (via the File menu column in the System Manager application).

### *Print Queued Report window*

**File:** From the displayed selection window, select the report you want to print, delete, or rename.

**Copies:** Enter the number of copies you want to print. If you want just one copy printed, press <Enter> to enter the default value, **1**. If you want to delete or rename the report, enter **0**.

**Delete:** If you want to leave the report in the queue, press <Enter> to select **No**, the default value. If you want to delete the report from the queue once it is printed, select **No**. If you do not delete the report at this time, you can return to this input window, choose to print **0** copies and select **Yes** to delete the report.

**Rename:** If you want to rename the report, select **Yes**. If you don't want to rename the report, press <Enter> to select the default value, **No**. If you rename the report, it's deleted from the print queue, but you can access it using other software products (for example, Lotus 1-2-3 or WordPerfect).



NOTE: The number of copies must be equal to **0** to recognize the entry of the full path and/or of the filename.

---

**To:** If you selected **Yes** at the **Rename** prompt, enter the new report name. The report name can be up to 20 characters in length including any system defined logical and filename extension. If no logical or filename extension is included, the system automatically defaults to the **RPT** directory and assigns the extension **.prt** to the name.

-----  
The Print Option menu is automatically pulled down to choose where you want to print the report for any number of copies greater than zero (**0**).  
-----

## 5 The Miscellaneous Menu Column

---

The Miscellaneous menu column lists selections for tasks performed at the end of a year or infrequently as with purging and/or building Sales analysis history.

From the Miscellaneous menu column you can

- Purge (sales) history for a specific analysis code or all codes, through a specified year and optionally save deleted data
- Build forecast history for use in various forecasting processes.

**Confirming the process:** Many of the processes selected from the Miscellaneous menu column are irreversible once started. For this reason, many processes have a confirmation field as a double check for the operator. If the confirmation field is more than one position and displays **NO** as the default, the entire word **YES** is required to actually start the process. A value of **Y** reverts to **NO** and does nothing.

If the confirmation field is a single position and the field prompt displays the field choices **Y/N**, a single entry of **Y** starts the process. For Windows environments, an Inquire window can display and require you to click OK or press <Enter> to confirm.

**“Find” shortcut:** Few functions within the Miscellaneous menu column offer the “Find” shortcut option. When enabled, you can use the “Find” shortcut to search for the record by any of the field choices displayed, based on the record key(s). For additional information regarding wildcards, options, and details of the “Find” shortcut, please refer to the General Concepts User’s Reference manual.

**Keyboard shortcuts:** For your system’s actual keyboard shortcuts, pull down the General or Records menu column for Windows environments, within a menu column selection. Pull down the General, Records, and/or Input menu columns for the keyboard shortcuts in a non-Windows environment.

### 5.1 Purging sales summary history records

---

The “Purge history” function allows you to purge sales history records for one or more sales analysis codes. For example, you might want to purge sales history in order to remove a hand-altered record from the sales history file.

You should only purge history details after you’ve printed all reports required by your company. You will have the option of saving the deleted records in case you need to bring them back for some reason.



**Important:** Analysis of past sales and forecasting of future demand are dependent on an extensive sales history. When you purge, be sure you’ve left enough data for

Down To Earth to perform the Sales Analysis functions. Unless you choose to save the deleted records, purged records cannot be retrieved through Down To Earth.

---

### *Purge Summary Records window*

**Analysis code:** Enter the sales analysis code for the records you want to purge. If you want to purge all analysis code records on file, just press <Return> to enter the default of **0**.

**Year to purge thru:** Enter the year through which you want sales analysis records removed from the file. Once these records are removed, the inquiry and report functions will not be able to display or print these years.

**Saved deleted records:** Choose **Yes** if you want to save the records you are purging. Choose **No** if you do not want to save these records. If you choose **Yes**, the purged records for the detail transaction file will be saved as a sequential file named **WRK:sahist.pur**. If you choose to save the purged records, it is suggested that you copy off the newly created **sahist.pur** file into a separate directory in preparation for a future purge. For most operating systems, the next time you purge and save the deleted records, the new file will override the previous file of the same name.

**Confirm:** Type **YES** to confirm that you want to purge the specified records. Typing any other response (including **Y**) will abort the process. Press <Return> to accept the default of **NO** and abort the purge.

-----  
 Use the "Go" shortcut to start the purge process. There is no confirmation process.  
 The menu displays when the purge is complete.  
 -----

## **5.2 Build forecast history**

---

Select "Build sales history" from the Miscellaneous menu column to automatically create the forecast sales history needed from the sales order line history files to generate the records needed for forecasting (*safcst.ism*). The Sales Order line history (*oeilin.ism*) file is read to compute cost, freight, profit, and sales dollars. The data created is then utilized for the "Forecast sales inquiry," "Create forecast budgets," and "Modify forecast budgets" Transaction menu column selections.

This process is automatically executed from the menu selection – there are no operator prompts. The number of records read from the Sales Order line history file (*oeilin.ism*) are displayed for reference. Press <Enter> to display the Miscellaneous menu column.

## 6 Appendix A: Procedures

---

### 6.1 Manipulating sales analysis data

---

Down To Earth allows you to manipulate your sales, cost, or quantity data artificially. To try out various sales scenarios for specific analysis codes, select “Sales maintenance” from the Maintenance menu column.

You must define the **Analysis code**, **Year**, and **Record type** (Sales, Cost, or Quantities) to be altered. The Amounts window then displays twelve fields, one for each month (January through December) of the year you specified. Enter the new amount for each month of sales, quantity, or cost, depending on what you selected in the **Record type** field. If you enter an amount that is different from the original amount, this sales record will be flagged as hand-altered, and subsequent extracts of history will not replace it.

See the section, “Maintaining sales analysis data,” for a detailed description of this procedure.

### 6.2 Working with the Sales Analysis application

---

Once you have set up your analysis codes and extracted your data, you can work with the data in a variety of ways. Each of the following categories includes a group of related procedures. The lists include each function name, followed in parentheses by the name of the corresponding menu column.

**Code-based procedures:** A sales analysis code groups sales-related fields together in a variety of ways determined by the user. You can perform the following procedures on specific analysis codes:

- ✓ “Standard inquiry” function (Transaction menu column). Displays sales, cost, or quantity data on the terminal screen in amount, trend, or graph format.
- ✓ “Sales maintenance” function (Maintenance menu column). Displays an Amounts window that allows you to manipulate sales data.
- ✓ “Standard reports” function (Reports menu column). Allows you to print sales, cost, or quantity data in one of seven report formats.

**Item-based procedures:** You can perform the following procedures on specific item ID codes:

- ✓ “Purchase analysis” function (Transaction menu column). Allows you to interactively evaluate and change certain item-ordering parameters in the Inventory item file.

- ✓ “Forecast single item” function (Transaction menu column). Displays a single-item forecast interactively on the terminal screen.
- ✓ “Forecast items” function (Transaction menu column). Displays a multiple-item forecast interactively on the terminal screen.
- ✓ “Forecast report” function (Reports menu column). Allows you to print a forecast report for single or multiple items. For a single item, enter the same item ID code in both the **Starting item ID** and the **Ending item ID** fields. For multiple items, enter the starting and ending ID code for a range of items.

**Sales analysis procedures:** The following functions are used to analyze past sales history:

- ✓ “Standard sales inquiry” function (Transaction menu column). Displays sales, cost, or quantity data on the terminal screen in amount, trend, or graph format for a specific analysis code.
- ✓ “Item purchase analysis” function (Transaction menu column). Allows you to interactively evaluate and change certain item-ordering parameters in the Inventory item file for a specific item.
- ✓ “Standard reports” function (Reports menu column). Allows you to print sales, cost, or quantity data in one of seven report formats for a specific analysis code.

**Forecasting procedures:** The following functions are used to forecast future sales demand:

- ✓ “Forecast single item” function (Transaction menu column). Displays a single-item forecast interactively on the terminal screen.
- ✓ “Forecast items” function (Transaction menu column). Displays a single-item forecast interactively on the terminal screen.
- ✓ “Forecast report” function (Reports menu column). Allows you to print a forecast report for single or multiple items. For a single item, enter the same item ID code in both the **Starting item ID** field and the **Ending item ID** field. For multiple items, enter the starting and ending ID code for a range of items.

## 6.3 Changing a sales analysis code

---

If you change an analysis code, follow the sequence of steps below.

1. Use the “Purge history” function to remove the sales history for this analysis code.
2. Make the desired changes to the structure of this analysis code.
3. Use the “Extract sales history” function with the **Repull** option to update the sales history data for this analysis code.

## 6.4 “Hand altering” sales data

---

If you decide to explore possible sales scenarios, use the following procedure to hand alter the sales history for a specific analysis code.

1. Use the “Sales maintenance” function to manipulate the sales history for this analysis code.
2. When you’ve finished manipulating the altered data, use the “Purge history” function to remove the sales history for this analysis code.
3. Use the “Extract sales history” function with the **Repull** option to correctly update the sales history file for this code.

## 7 Appendix B: Troubleshooting / Common Down To Earth & DBL errors

---

---

### ◆ Corrupted data

There may come a time when your sales history data for a certain analysis code data no longer reflects reality, even when you're tried extracting and updating the data for that code. If you've changed or deleted an analysis code, the data for that code will become corrupted. If you haven't changed any codes, the data for this code has probably been altered by hand through the "Sales maintenance" function. Regardless of the cause, when data has become corrupted, you should follow the same sequence of steps to correct it:

1. Use the "Purge history" function to remove the corrupted data from the sales history file for this analysis code.
2. If you're changing the structure of this analysis code, make those changes now.
3. Use the "Extract sales history" function with the **Repull** option to update the sales history data for this analysis code.

### ◆ Not enough data for analysis

This message will display if you've purged too much data from the sales history file, leaving insufficient data for analysis or forecasting. Remember that your sales data comes from the Order Entry history file. As long as the Order Entry data remains intact, you can just use the "Extract sales history" function with the **Repull** option to get your data back.

However, if the Order Entry history file has been purged, it's too late. You can't get your sales data back unless you chose to save your deleted records and can retrieve and load them back into the Order Entry history file. Remember, use caution when purging!

### ◆ Error 18: File not found

The file specified was being accessed by a program but was not found in the location assigned to the logical specified. Either the file is truly not there and must be created or the Device assignment is incorrect. The file has been created but the program was looking in the wrong place.

## 8 Appendix C: ASCII displayable characters

Below is a table with the most common displayable characters associated with their ascii equivalent. Note that some ascii values are not associated with characters considered printable and are not included in this table. The two minus signs on either side are there to help indicate the size and respective vertical placement of the special character. The minus signs themselves are not included with the character when displayed.

033 --!--	034 --"--	035 --#--	036 --\$--	037 --%--	038 --&--	040 --(--
041 --)--	042 --*--	043 --+--	045 ----	047 --/--	048 --0--	049 --1--
050 --2--	051 --3--	052 --4--	053 --5--	054 --6--	055 --7--	056 --8--
057 --9--	058 --:--	059 --;--	060 --<--	061 --=--	062 -->--	063 --?--
064 --@--	065 --A--	066 --B--	067 --C--	068 --D--	069 --E--	070 --F--
071 --G--	072 --H--	073 --I--	074 --J--	075 --K--	076 --L--	077 --M--
078 --N--	079 --O--	080 --P--	081 --Q--	082 --R--	083 --S--	084 --T--
085 --U--	086 --V--	087 --W--	088 --X--	089 --Y--	090 --Z--	091 --[--
092 --\--	093 --]--	094 --^--	095 --_--	096 --`--	097 --a--	098 --b--
099 --c--	100 --d--	101 --e--	102 --f--	103 --g--	104 --h--	105 --i--
106 --j--	107 --k--	108 --l--	109 --m--	110 --n--	111 --o--	112 --p--
113 --q--	114 --r--	115 --s--	116 --t--	117 --u--	118 --v--	119 --w--
120 --x--	121 --y--	122 --z--	123 --{--	124 -- --	125 --}--	126 --~--
127 -- --	130 --,--	131 --f--	132 --,--	133 --...--	134 --†--	135 --‡--
136 --^--	137 --%o--	138 --Š--	139 --<--	140 --Œ--	145 --‘--	146 --’--
147 --“--	148 --”--	149 --•--	150 ----	151 -----	152 --~--	153 --TM--
154 --š--	155 -->--	159 --ÿ--	160 -- --	161 --j--	162 --ç--	163 --£--
164 --æ--	165 --¥--	166 -- --	167 --§--	168 --¨--	169 --©--	170 --ª--
171 --«--	172 --¬--	173 ----	174 --®--	175 --¯--	176 --°--	177 --±--
178 --²--	179 --³--	180 --´--	183 ----	184 --,--	185 --¹--	186 --º--
187 --»--	188 --¼--	189 --½--	190 --¾--	191 --¿--	192 --À--	193 --Á--
194 --Â--	195 --Ã--	196 --Ä--	197 --Å--	198 --Æ--	199 --Ç--	200 --È--
201 --É--	202 --Ê--	203 --Ë--	204 --Ì--	205 --Í--	206 --Î--	207 --Ï--
208 --Ð--	209 --Ñ--	210 --Ò--	211 --Ó--	212 --Ô--	213 --Õ--	214 --Ö--
215 --×--	216 --Ø--	217 --Ù--	218 --Ú--	219 --Û--	220 --Ü--	221 --Ý--
222 --Þ--	223 --ß--	224 --à--	225 --á--	226 --â--	227 --ã--	228 --ä--
229 --å--	230 --æ--	231 --ç--	232 --è--	233 --é--	234 --ê--	235 --ë--
236 --ì--	237 --í--	238 --î--	239 --ï--	240 --ð--	241 --ñ--	242 --ò--
243 --ó--	244 --ô--	245 --õ--	246 --ö--	247 --÷--	248 --ø--	249 --ù--
250 --ú--	251 --û--	252 --ü--	253 --ý--	254 --þ--	255 --ÿ--	256 --?--

## 9 Appendix D: Record Layouts

---

**Filename:** sasumh.rec

**Record description:** Sales Summary History file

**Record length:** 203

**Primary key:** 1.50 sas\_comp, sas\_type, sas\_data, sas\_year, sas\_rtyp

record sasumh

sas_key	,a50		; Primary key
sas_comp	,a2	@sas_key	; Company code
sas_type	,a3	@sas_key+2	; Key type
sas_data	,a40	@sas_key+5	; Key data
sas_year	,d4	@sas_key+45	; Year
sas_rtyp	,a1	@sas_key+49	; Record type
			; S - sales
			; Q - quantity
			; C - cost
sas_amnt	,12d12		; Summarized amounts (9.3)
sas_date	,d8		; Last update date (YYYYMMDD)
sas_entr	,a1		; Entry type
			; C - hand changed
			; H - hand entry
			; O - order history

**Filename:** sapurr.rec

**Record description:** Sales Analysis purchase recommendation file record map

**Record length:** 90

**Primary key:** 1.26 sap\_comp, sap\_item

record sapurr			
sap_key	,a26		; Primary key
sap_comp	,a2	@sap_key	; Company code
sap_item	,a24	@sap_key+2	; Item ID
sap_ftyp	,a1		; Forecast type
			; S - Smith
			; H - Holt
			; W - Winters
sap_sdat	,d8		; Date factors last set (YYYYMMDD)
sap_alph	,d2		; Alpha factor
sap_beta	,d2		; Beta factor
sap_gama	,d2		; Gamma factor
sap_sfac	,d2		; Smoothing factor
sap_seas	,d2		; Seasonality length
sap_error	,d6		; Last absolute error value
sap_fdat	,d6		; Forecast date (YYYYMM)
sap_nqty	,3d6		; Next 3 months forecasted quantity (6.0)
sap_qday	,3d5		; Average daily demand for next 3 mos (4.1)

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